

Judicial Information Systems Council Meeting (JIFFY)

Meeting Minutes

Judicial Information Division

Thursday August 21, 2014

9:43 - 12:21 p.m.

JIFFY Voting Members Present:

Judge Michael Bustamante, Chair

Judge Karen Mitchell, Vice Chair

Judge Duane Castleberry

Judge Alan Kirk

Jason Jones

Greg Ireland

Tobie Fouratt

Guests Present:

Robert Padilla

Joe Moore (video)

Theresa Delgado (phone)

Oscar Arevalo

JID Staff Present:

Helen Miller

Carlos Cordova

Grace Catanach

Annie Hall

JIFFY Non-Voting Members Present:

Justice Petra Jimenez-Maes

Renee Cascio

I. Approval of Agenda. Judge Bustamante called the meeting to order at 9:43 am. The agenda order was changed to accommodate presenters who had to attend an earlier meeting.

II. JIFFY Subcommittee Activities.

Judges User Group. Judge Mitchell reported that the first item on the Odyssey Judges User Group (OJUG) agenda was “*defendants declared incompetent and dangerous*” and JID will be developing a procedure and send it out for the next meeting. The second item on the agenda was “*attorney request for disposition codes*” out of BCMC. This issue will be discussed with the chief judge of BCMC in order to determine if it is an isolated instance between the judge on the case and the attorney of record. “*Criminal contempt case types*” was next and JID will develop a case type proposal and a procedure for how to handle those cases in Odyssey. The last item on the agenda was “*out of district judges and their TCAAs having the ability to calendar outside of their own district*” and that issue will be sent to the court administrator requesting that they look at the existing procedure and find out if it is being followed, if there is a problem with that procedure and then it will be brought back to OJUG.

Odyssey Steering Committee. Judge Mitchell stated that the Odyssey Steering Committee has not met and will only meet at the call of the Chair and may not meet as the majority of the Odyssey issues are being handled by OJUG.

Forms Committee. Judge Mitchell explained that the Forms Committee met and decisions were made with regard to a number of forms, many of which are in release for testing or are in production. The ultimate goal is that the Odyssey forms match the black book Supreme Court approved forms, which is not presently the case. JIFFY was asked to give direction as to what protocol to follow before the changes are implemented in Odyssey?

Judge Mitchell spelled out four categories of forms and the recommendations by the committee to JIFFY:

- 1) Clerical changes such as a typo that could be sent directly to the helpdesk and cc'd to the committee.
- 2) Substantive rule changes would go to the Rules Committee of Limited Jurisdiction and/or Forms and JIFFY and it will be worked on simultaneously. Judge Buddy Hall and Shari Weinstein are both members of the Rules Committee of Limited Jurisdiction Committee and Judge Walton and Katie Pena are on the Metropolitan Court Rules Committee which can help expedite the process.
- 3) The proposal for handling administrative forms which consist of forms that are not in the black book as Supreme Court approved forms, would start with the Forms Committee, then on to the Magistrate Director, from there to Artie Pepin, then back to the Magistrate Director and on to the helpdesk and become a ticket item to either make changes or create that particular administrative form, if it is approved through all of those channels. Administrative forms could come from the field, the Magistrate Director, a member of the Forms Committee or from the AOC Director. This is to give direction to the helpdesk so that the helpdesk is not changing or adding forms without a process.
- 4) Form changes that are necessitated by a change in the law and/or a change in the rule but the form has not caught up to that yet would go to the Forms Committee, to the Magistrate Director and then to the helpdesk.

Joey Moya will take the changes that were made to the forms, the Supreme Court would receive a binder with all of the changes and the Court could decide which forms needed to be formally changed in the Black Book. This would give attorneys and court staff an approved template to follow. Justice Maes stated that with electronic filing there has to be a set of forms that everyone must use the way that they are created. Renee Cascio explained that during the rollout the process followed was that Karen Janes would write up changes that were not considered substantial and the forms committee would review the changes. Ms. Janes did authorize the changes that did not always match the Black Book. Substantial changes were

delayed due to the state and BCMC rollouts. Judge Bustamante stated that JIFFY would like to have a report from the Forms Committee on the effect of the changes made and how it affects JID within the system.

Online Access Committee. Judge Bustamante reported that the Online Access Committee (OAC) hosted the Public Access meeting on July 10, 2014 and eight people from various courts, agencies and the public addressed the committee. The access group listed as “*Non-State Eleemosynary Users*” was created as a result of the number of non-state charitable entities who attended the Public Access meeting requesting more access. There were no comments or questions from any of the remote sites who attended via video.

- Portal which is the replacement for OPA is not as close to completion as JID was led to believe and may not be ready for implementation in the first quarter of 2015. Renee Cascio explained that it is very labor intensive having 1100 OPA users and cannot move towards more open access unless self- registration was incorporated into the system, which is not available on the current OPA. Tyler will be installing the existing Portal on JID’s site this month in order to test it.
- Judge Bustamante presented the “*New Mexico Judiciary Online Access Proposal to JIFFY*” written by Steve Prisoc which highlights the OAC’s plans for the future of online access in New Mexico.
- At the August 11, 2014 OAC meeting, the Matrix was revised and Judge Bustamante presented it to JIFFY for review. Reading the Matrix from top to bottom, the top tier has the broadest access and the access becomes more restrictive the further down the list one reads. Looking at each of the columns, the first column lists the different access groups such as Court Staff, Justice Partners, three kinds of attorneys, Court Kiosk (a way of getting access), Registered Users, Non-Registered & E-pay Users, Non-State Eleemosynary Users, and Anonymous/ Public Users. The second column is a definition of each of the access groups, column three is examples of users, and the remainder of the columns tell what access each of the user groups will have and if there will be a charge or it will be free. The last column entitled “*Reports (\$)*” is for those who wish to design their own reports consisting of bulk data and will not be available anytime in the near future. The different groups will have different levels of access depending on the level of need for that access and some groups will pay for access.

- Judge Mitchell clarified the access a court staff member has to Odyssey at work is whatever access that job title allows and this is very different than when that same person is at home and goes on Case Lookup or OPA where they are now in the category of Public and that the term “*Court Staff*” needs to be further defined. Renee Cascio asked that consideration be given to giving different levels of access to the various levels of employees and most staff would only be entitled to the public level of access and those who need greater access in order to fulfill their duties at work, could be granted a secure logon for greater access. Every person has their own rights and roles in the court system, all employees can see the case docket in any case and scanned documents unless they are sealed or secured. If it is sealed or secured it can only be viewed by those who work at the court where the case is taking place.
- After discussing the access needed by E-pay users, it was agreed that E-pay users should have their own line, be given an X under Enhanced and have the wording “*Case-Specific*” to make it clear that this access applies only to their case.
- Tyler wishes to see how NM courts want to stratify access in order to use this as part of the design process. Ms. Cascio explained that it is possible for JID through OPA to control what case types people have access to and assumes that this functionality will be moved to Portal.

III. CIO Report. Renee Cascio as the acting Deputy CIO presented the CIO report. Ms. Cascio stated that the first recruitment had very few applicants. With the assistance of a former Deputy CIO and SPO, there are 46 people who have applied for the CIO position and a number of them are from New Mexico. The week of September 8 is reserved for the interviews.

- Tom Clark, the Vice President of the National Center for State Courts visited New Mexico on August 19 to learn about JID’s Video Remote Interpreter (VRI) project and to see the Self-Represented Litigant (SRL) kiosk in use at the 2nd JDC. The National Center is planning to create a consortium of interpreters who will be available throughout the country remotely through video technology which may result in great savings for New Mexico.
- The systems team is encountering some difficulty configuring the E-payment site and is working with Tyler. The first pilot will be held in the Torrance County Magistrate Courts and the second pilot will take place in Las Cruces. Chase accounts will have to be set up electronically through the AOC fiscal department. The goal is that eventually the public

will be able to pay their fines and fees on their computers at home. The tills at the courts will close automatically at midnight every night and reopen when the first payment is made in the morning which will make the reconciliation process much simpler for the court clerks.

- The FY16 budget was approved by the Budget Committee and by CJC for JID. Steve Prisoc is working on the C2 Document and the IT Plan.
- Renee Cascio informed JIFFY that the first group of 25 configured recommendations for the Supreme Court Odyssey implementation was made to Joey Moya who will take it to the Supreme Court to review. Each recommendation is being written with full explanation and asking for signatures in order to have documentation on why some decisions were made.

IV. Purchase Requests.

AOC Request to Purchase Tablets for Magistrate Judges. Carlos Cordova explained that there are two tablets available, one comes with Wi-Fi alone (you must have Wi-Fi access) and the other has Wi-Fi and cellular where a data plan can be purchased through cellular providers. The tablets will have from 16 GB of ram to 128 GB of ram and the prices are from \$600-\$900. Ms. Cascio informed JIFFY that these tablets would be for judges to use at home in order to sign warrants and review information when they are contacted at night. Pilot projects are being tested in Las Cruces and Santa Fe.

V. Review and Approval.

Moving Proposed Orders & Domestic Relation Cases into File & Serve. Renee Cascio reported that JID is working on moving domestic relations cases into File & Serve and to move proposed orders from email into File & Serve. Tyler was asked to change File & Serve so that it would not allow anything but PDF documents to go into e-file for New Mexico and Tyler performs this function by prohibiting doc. & docx. documents to be filed. Proposed orders are regularly changed by judges and the documents must be doc. or docx. and Tyler is looking at an alternative. A bug has been detected in the version of File & Serve that is being tested for domestic relations cases that would affect all case types. There is new functionality that will allow attorneys to select the parties for whom they are filing. When these cases find their way to the clerks review cue, if the clerk makes any changes to the file the parties disappear. If Tyler does not have a solution to this problem in the near future, domestic relations will have to be

moved into the current version of File & Serve and proposed orders and the newer version will be on hold.

Self-Represented Litigant Kiosk Pilot of Domestic Relations. Greg Ireland reported that this project is to assist the self-represented litigant (SRL) create documents. Tyler has created software that enables the courts to create scripts where the party of record by virtue of answering questions, will create a document that will enable the user to print the document and file it. Pilots of this program were located at the 2nd JDC kiosks, it is now online. SRL's are using it to create documents such as the indigency petition and in turn prepare a proposed order for the judge to sign. As the scripts are built, more and more case types such as uncontested divorces will be available to the public.

Removing AS400 Public Access & Limiting Justice Partner Access. Renee Cascio pointed out that there are a number of issues around removing AS400 public access. Documents that BCMC had been scanning into the AS400 were not converted to the Odyssey system and some of those documents that are part of pending cases are still only available through the AS400. There is at least one company that sells information that has complete access to all of BCMC's data. Ms. Cascio suggested notifying the justice partners that access was going to be prohibited and they should retrieve all of the data that they would need for their cases.

VI. Budget and Revenue.

JID Revenue Pipeline. Oscar Arevalo presented the "*FY 14 JID Revenue Pipeline*" and reported that last year's totals were exceeded by over \$100,000. Page 3 shows that FY14 started out with a fund balance of \$849,858 and ended with \$800,961 which shows the leveraging on one time appropriations and cutting back on costs. Red Light Camera ended the year with \$436,664.87.

- The "*FY15 JID Revenue Pipeline*" was presented next and Mr. Arevalo noted that the FY14 budget is as of yet still unaudited. The total budget in CMS of \$927,800 and out of that approximately \$890,000 was expensed, and the remainder will be carried over to FY15 which will adjust the budget to \$4,146,878.50. The carryover of SCAF Revenue from FY14 to FY15 is \$97,444.28. Mr. Arevalo stated that if all budget capacity is expensed, it is projected that the actual fund balance will be \$48,000. In FY15 there is an increase in general fund of \$121,000 that can be used to offset maintenance costs. The goal is to use the general fund for items that are recurring and utilize SCAF for the one-time expenses. In disaster recovery expenses, \$825 will be reverted. The e-filing account

has a remaining balance of \$22,400 which will be budgeted and expensed for FY15. The only revenue (at this time) for Red Light camera fund projected for FY15 is from Rio Rancho.

- Mr. Arevalo reported that for the FY16 budget an increase of \$344,500 was requested for the general fund for statewide automation which was approved by Budget Committee and CJC. The other state funds were lowered for the statewide automation \$313,700. The expansion position as it relates to statewide automation Budget Committee approved six IT specialists and one database administrator.

VII. Future Meetings. The next meeting will be held on Thursday, September 18, 2014, 9:30 a. m., at the Judicial Information Division in Santa Fe.

VIII. Adjourn. Judge Bustamante adjourned the meeting at 12:21p.m.